Palliative Care Provider Site Review Survey

MPQP1022 – Attachment L

Health Plan	PHC	**IPA**		**Site ID No.**		**Review Date**		**Last Review Date**	

Provider Name/ Address		**Phone**		**Fax**	

Contact Person/Title		**Reviewer/Title**	

Visit Purpose:

_____ Initial Full Scope _____ Monitoring _____ Periodic Full Scope _____ Follow-up _____ Focused Review _____ Ed/TA _____Other _____

EHR System used:

Site Scores

	Points Poss.	Yes Pts. Given	No's	N/A's	
Interview Question	**1**				
Office Management	**5**				
	6				
	Total Pts. Poss.	**Yes Pts. Given**	**No's**	**N/A's**	

Scoring Procedure

1) Add points given in each section.
2) Add total points given for all six sections.
3) Adjust score for "N/A" criteria (if needed), by subtracting N/A points from 6 total points poss.
4) Divide total points given by 6 or by "adjusted" total points.
5) Multiply by 100 to get the compliance (percent) rate.

_____ ÷ _____ = _____ X 100 = _____%

Points Given / **Total / Adjusted Points** / **Decimal Score** / **Compliance Rate**

Compliance Rate

_____ **Exempted Pass: 90% or above**

_____ **Conditional Pass: 80-89%**

_____ **Not Pass: Below 80%**

_____ CAP Required

_____ Other follow-up

Next Review Due: _____

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Purpose: Site Review Guidelines provide the standards for the site review survey. These Guidelines shall be used as a gauge or touchstone for measuring, evaluating, assessing, and making decisions.

Scoring: Site survey includes on-site inspection and interviews with site personnel. Reviewers are expected to use reasonable evidence available during the review process to determine if practices and systems on site meet survey criteria. Compliance levels include:

1) Exempted Pass: 90% or above
2) Conditional Pass: 80-89%
3) Not Pass: below 80%

A corrective action plan (CAP) is required for a total score less than 90%. Compliance rates are based on 6 total possible points, or on the total "adjusted" for Not Applicable (N/A) items. "N/A" applies to any scored item that does not apply to a specific site as determined by the reviewer. Reviewers are expected to determine how to ascertain information needed to complete the survey. Survey criteria to be reviewed only by a R.N. or physician is labeled **RN/MD Review only**

Directions: Score full point(s) if survey item is met. Score zero (0) points if item is not met. Do not score partial points for any item. Provide assistance/consultation as needed for CAPs, and establish follow-up/verification timeline.

1) Add the points given in each section.
2) Add points given for both sections to determine total points given for the site.
3) Subtract all "N/A" items from 6 total possible points to determine the "adjusted" total possible points. If there are no "N/A" items, calculation of site score will be based on 6 points.
4) Divide the total points given by 6 or by the "adjusted" total. Multiply by 100 to calculate percentage rate.

Scoring Example:

Step 1: Add the points given in each section. Example: 1 (Interview Question) 5 (Office Management)	**Step 2**: Subtract "N/A" points from 6 total points possible. 6 (Total points possible) – 1 (N/A points) 5 ("Adjusted" total points possible)
Step 3: Divide total points given by 6 or by the "adjusted" points, then multiply by 100 to calculate percentage rate. $\frac{\text{Points given}}{\text{6 or "adjusted" total}}$ or $\frac{4}{5} = 0.80 \times 100 =$ **80%**	

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Interview Questions	Yes	No	N/A	Wt.	Responses
1. How many patients are enrolled in the program?				0	Comment answer only
2. Do you provide 24/7 telephonic access to your patients? i.e. outsource after-hours calls, staff rotate taking after hours calls, etc.				1	Comment plus Y/N/N/A
3. Describe the makeup of your team. How often do you meet to discuss each patient?				0	Comment answer only
4. Is your organization a member of the Center to Advance Palliative Care (CAPC)?				0	Comment plus Y/N/N/A
5. How many physicians?				0	Comment answer only
6. How many registered nurses (RN)?				0	Comment answer only
7. How many Licensed Vocational nurses (LVN)?				0	Comment answer only
8. How many Licensed Clinical Social Workers/Masters of Social Work (LCSW/MSW)?				0	Comment answer only
9. How many managers?				0	Comment answer only
10. How many “other” types of staff?				0	Comment answer only
11. How many Chaplains?				0	Comment answer only
12. Notes				0	Comment field for notes

Total points possible 1.

Notes:

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Criteria	Office Management
1. Current Palliative Care Certifications?	Current Palliative Care Certifications? – All medical professional licenses and certifications must be current and issued from the appropriate agency for practice in California. Physician Certification Nurse Certification Advanced Certified Hospice and Palliative Social Worker (ACHP-SW) Chaplaincy Certification Personnel who are not certified have either 1 year or more of experience, OR received 12 hours didactic training or have 1 year experience in palliative care- There is a documentation on site of a proof of training or 1 year experience in palliative care, including the name of the training or program attended and who conducted the training. Proof can include a certification and copy of the training module. If caring for Pediatric Patients, then all staff caring for Pediatric Patients will have Pediatric Palliative Care Training
2. Designated administrative lead/contact?	Designated administrative lead/contact? Site designates staff responsible for completing and submitting required Physician Orders for Life-Sustaining Treatment (POLST) and Edmonton Symptom Assessment System (ESAS) reporting templates to support compliance with Partnership palliative care quality reporting.

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Office Management	Yes	No	N/A	Wt.	Site Score
Professional health care personnel have current California licenses and certifications.					
1) Current Palliative Care Certification OR if Personnel do not have certification, there is documentation of at least 1 year of experience in palliative care OR enrollment in to palliative care specific training within 3 months of working for the organization. Training MUST be completed within 6 months and be a minimum of 12 hours.					
a) Physician				1	
b) Nurse				1	
c) Advanced Certified Hospice and Palliative Social Worker (ACHP-SW)				1	
d) Chaplaincy Certification				1	
2) Designated administrative lead/contact? _____				1	
Yes					
No					
N/A					

Total pts possible: 5